Summary

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1. Introduction

For many decades, Swedish pine was a popular choice in the international market. In recent years the tide has turned and suppliers of pine products have lost sales and market share. Industry organisation Swedish Wood has, however, begun to see indications that the negative trend is shifting and pine is becoming more on-trend. Producers of pine products are therefore keen to gain a clear picture of market requirements and expectations when it comes to interior wood products.

This report is a summary of a study conducted as part of the research and development programme *BioInnovation – Biobased Construction and Housing of the Future* as part of the sub-project *Market Conditions and Business Models.* The overarching aim of the sub-project is to identify the market's range of requirements and expectations relating to interior wood products for construction and housing, with a specific focus on pine. The study summarised here helps to meet this aim by examining customer preferences for exposed wood in various markets. The questions addressed were:

- What interior design styles dominate and how does interior wood fit in with these styles?
- Where in the home do consumers want wood?
- What are the preferences regarding the look of wood products?
- What is important when purchasing home furnishing products?

The study took the form of a questionnaire in seven European countries: Sweden, Norway, the UK, Poland, Germany, France and Spain. The purpose of this spread was to provide a broad picture of the markets and to investigate whether the preferences for wood/pine vary between countries. Just over 7000 responses were received, with the respondents constituting a nationally representative sample of women and men aged 20-65 in each country.

To enable readers to find the parts that interest them quickly, the summary has been split into sections that look at each question separately. The sections present a summary of the results, along with related conclusions. For those who would like to read a more detailed analysis, each figure is accompanied by page references for the original Swedish report *Trä i hemmet – En undersökning i sju europeiska länder om inredningsstilar och intresset för svenska interiöra furuprodukter till hemmet* (Wood in the home – a study in seven countries of interior design styles and interest in Swedish pine interior products for the home), which can be found on Swedish Wood's website.

The project group comprises representatives from Linköping University (LiU), Luleå University of Technology (LTU) and Swedish Wood. Questionnaire gathering and analysis were conducted by Mantap Global AB on behalf of the project group, with Visualisera AB also providing interior design expertise. The cooperation partners are Norra Skogsägarna, SCA, SSC Skellefteå AB, Sveaskog and TräBranschNorr.

2. Interior design styles and interior wood

2.1. Style preferences

Four interior design styles (Fig. 1) were presented in order to establish whether there are any major differences in the styles different countries prefer.

Fig. 1. The looks of the investigated styles and the question (pp. 16-25 in the report[1]).

In all the countries, the Modern style was received most positively, followed by Scandinavian and Rustic (Table 1.) Classic was the only style that received more negative than positive responses. The greatest difference in preferences between the countries came in the Classic and Modern styles (Fig. 2).

Table 1. Results for all countries (average[#])

	Average preference (%)		
Style:	Positive	Neutral	Negative
Modern	75	14	11
Scandinavian	62	23	15
Rustic	56	24	20
Classic	31	23	46

[#] *calculated from graphs on pp. 18-21 in the report[1].*

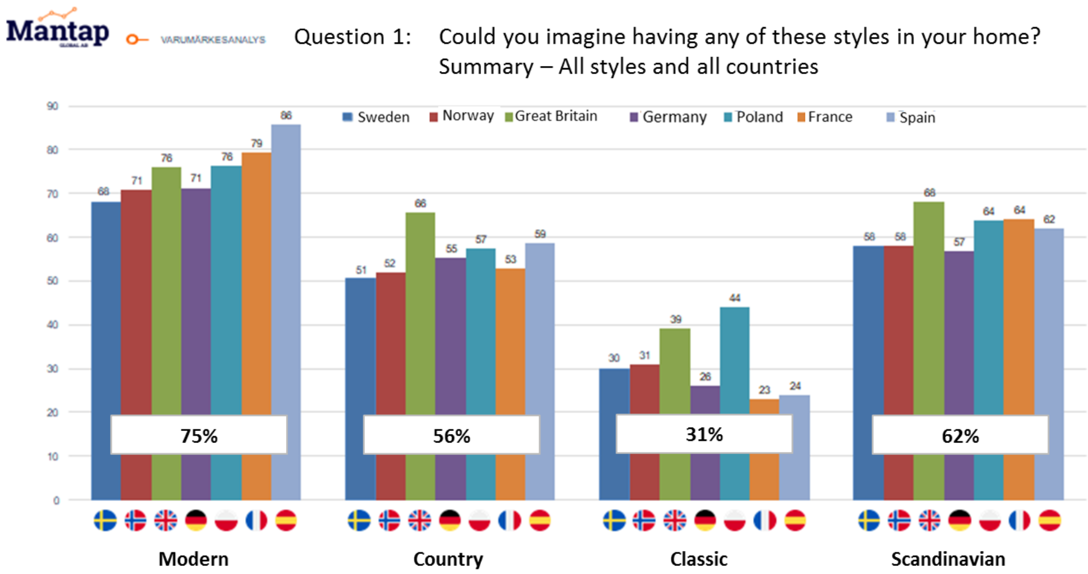

Fig. 2. Positive statements as a proportion of overall responses for each country (p. 22 in the report[1]).

[1] *Trä i hemmet - En undersökning i sju europeiska länder om inredningsstilar och intresset för svenska interiöra furuprodukter till hemmet.* Available on Swedish Wood's website.

2.2. Appropriate amount of wood in the different styles

The question asked was "How much wood is appropriate in the four interior design styles?". Three levels of wood use were offered for each style (Fig. 3):

- High – floor, furniture and wall
- Moderate – floor and furniture
- None – no exposed wood

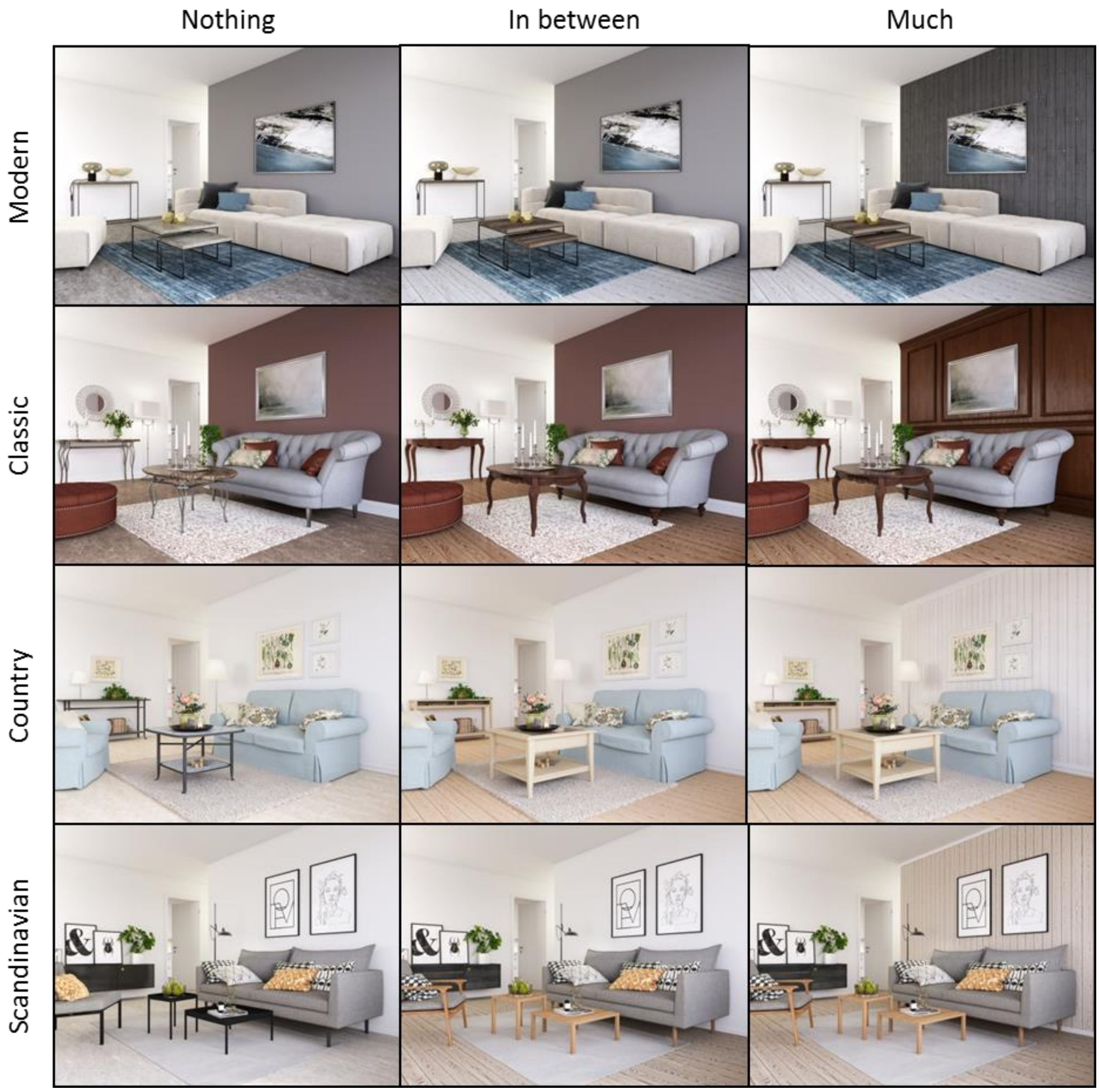

Fig.3. The images shown in the questionnaire to represent the different amounts of wood. The images were produced by Visualisera AB in close collaboration with the project group.

The results show a distinctly positive response to wood in all countries, irrespective of the interior design style (Fig. 4). This is apparent in the fact that a *Moderate* amount of wood (wood for the floor and furniture) is consistently seen as appropriate by most people, and that *High* use of wood is the second most popular choice for all countries and styles, with *None* considered the least desirable option. The clearest positive response to the introduction of wood into a room can be seen in the Rustic style (on average 32% more consider a moderate amount of wood suits the style, compared with no wood; the other styles see a positive difference of 22-29%). Rustic is also the style where a high amount of wood performs best in relation to the other two options (25% more consider that high amounts of wood suit the style, compared with no wood; the other styles see a positive difference of 7-15 %. Only 7% fewer consider that high amounts of wood suit the style compared with moderate amounts; the other styles see a negative difference of 14-15%). The style preference (see previous question) also comes through clearly in this question. This makes the differences between the various amounts of wood in each style more interesting than the absolute differences between styles. Some variation in the proportion of positive/negative responses can also be seen across the styles.

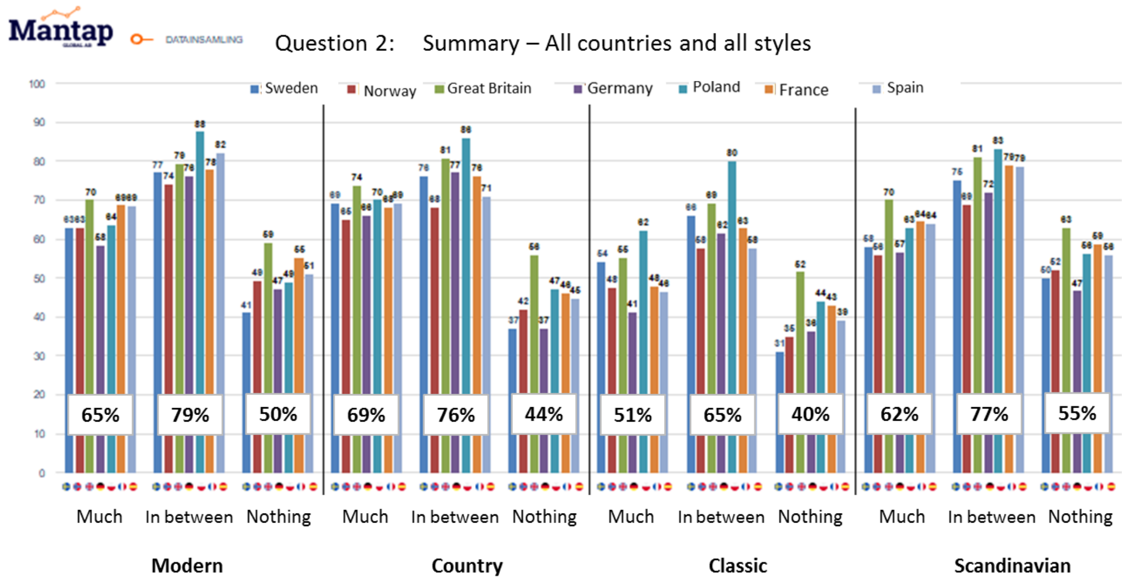

Fig.4. Percentage of respondents who are positive about the amount of wood (p. 52 in the report[2]).

2.3. Conclusions: interior design styles and interior wood

Wood reinforces a positive attitude towards the different styles, i.e. people become more positive towards a style if it has exposed wood than if there is no wood. In all the countries, a moderate amount of interior wood (represented in the study as wood for the floor and furniture) is considered appropriate, irrespective of the interior design style.

The results indicate major differences in how the four interior design styles perform against each other, but there are generally no great differences between the countries. The Modern style is the preferred type of interior in all the countries, followed by Scandinavian and Rustic. The style with the least votes is Classic.

[2] *Trä i hemmet - En undersökning i sju europeiska länder om inredningsstilar och intresset för svenska interiöra furuprodukter till hemmet.* Available on Swedish Wood’s website.

3. Where in the home consumers want wood

The respondents were then asked to state where they want wood in the home, from a choice of living room, kitchen and bedroom. They were also asked what flooring material and wall covering they prefer in these rooms.

3.1. General observations, doors and windows

It is positive to note that few of the respondents state a preference for no wood in the rooms (Fig. 5). There are fewer people who don't want wood in the living room and bedroom (2-9% depending on the country and room) than don't want wood in the kitchen (6-22%) (Fig. 5). The fact that more people want wood in the living room and bedroom than in the kitchen is true across the board, whatever the application, with the exception of doors and windows, where the results are quite similar from room to room (averaging 45-50% and 31-34% respectively). The countries do, however, differ on this point. For windows, the countries can be divided into two clear groups, with Sweden, Poland and Norway forming the group where wood is most popular (averaging 46%, against 23% for the other countries); when it comes to doors, Poland stands out as the country where most people want wood and France is the country where the lowest proportion want wood (64% and 35%, compared with an average of 47% for the rest).

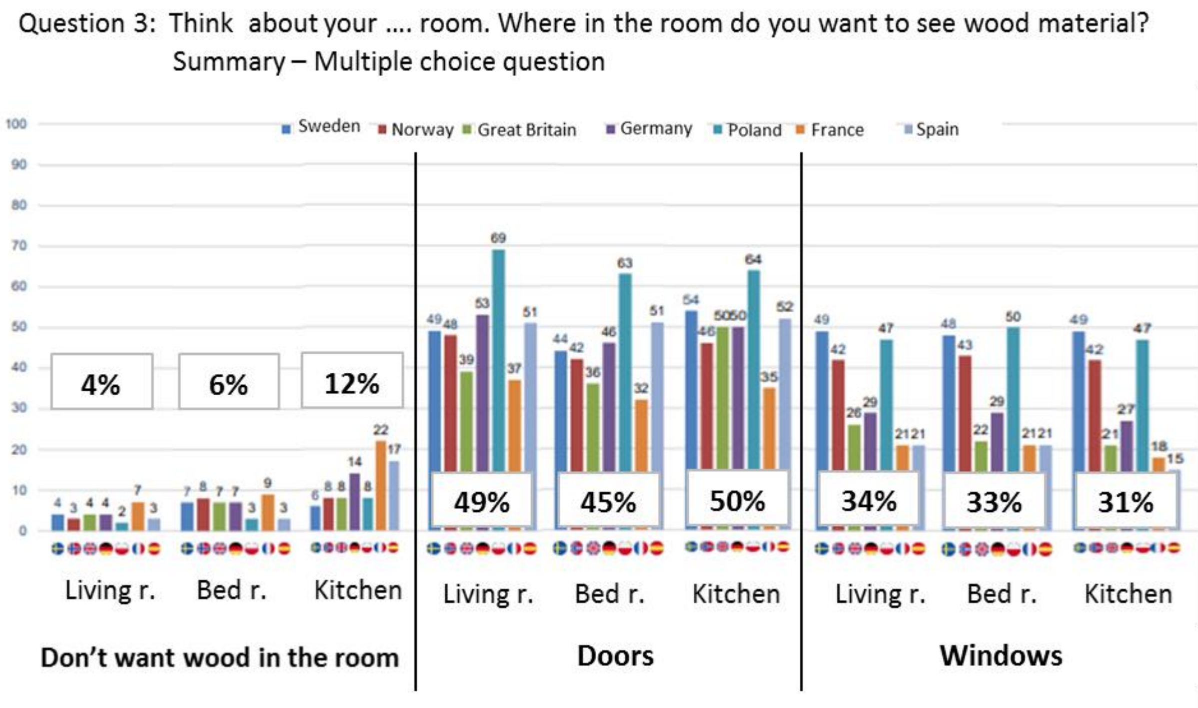

Fig. 5. Proportion of people who don't want wood in the room, want wood in doors and want wood in windows for the living room, bedroom and kitchen (pp. 56-62 in the report[3]). Note that this is a question where multiple responses are permitted.

3.2. Wall coverings

A relatively large proportion of the respondents (average 23-25%) would like wood cladding on a feature wall or part of a wall in the living room and bedroom, but fewer want this in the kitchen (average 13%) (Table 2). Many respondents in Norway want wood on all walls (16-25% depending on

[3] *Trä i hemmet - En undersökning i sju europeiska länder om inredningsstilar och intresset för svenska interiöra furuprodukter till hemmet.* Available on Swedish Wood's website.

the room). In the other countries, more consumers prefer a feature wall or part of the wall in wood to having all the walls clad in wood (generally more than double the number, see Table 2). Unsurprisingly, tiles or brick and painted surfaces are most popular in the kitchen, while painted surfaces and wallpaper generally come top in both the bedroom and the living room (Fig. 6).

Table 2. The proportion of people who want wood cladding on a feature wall/part of a wall or on all walls, separated out into living room, bedroom and kitchen (pp. 56-62 in the report[4]).

		Sweden	Norway	Great Britain	Germany	Poland	France	Spain	Average
Living r.	*Accent wall*	22	27	19	24	26	29	27	**25**
	All walls	9	21	8	7	6	9	12	**10**
Bed r.	*Accent wall*	22	22	15	21	28	29	27	**23**
	All walls	11	25	8	6	8	12	12	**12**
Kitchen	*Accent wall*	16	16	10	12	11	15	8	**13**
	All walls	7	16	7	4	4	6	5	**7**

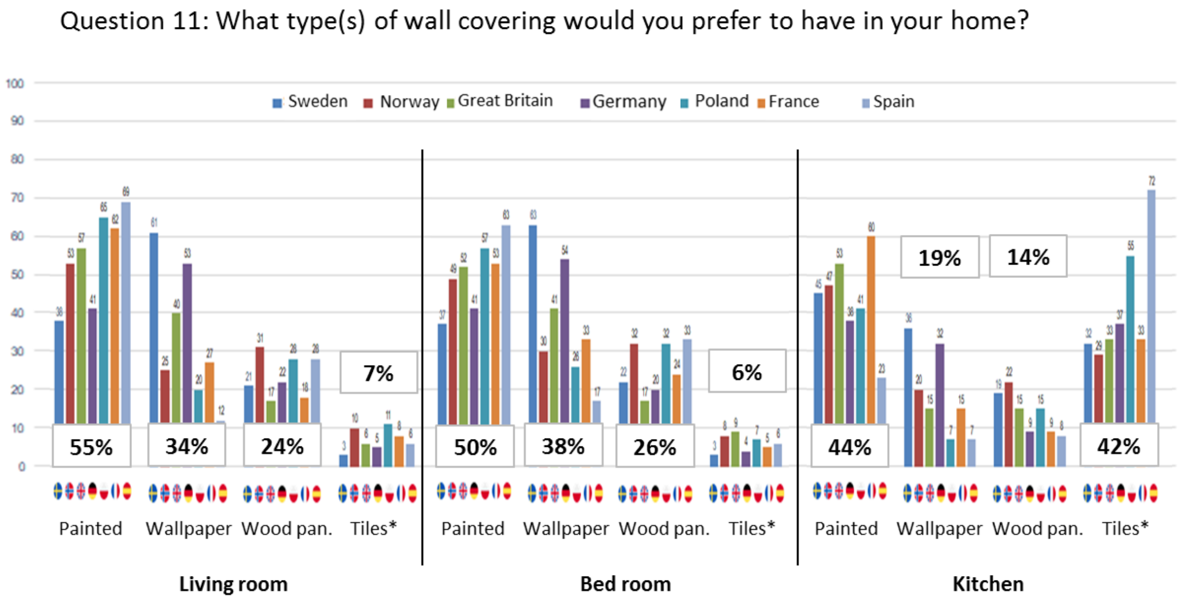

*Fig. 6. Wall coverings that the respondents prefer in the living room, bedroom and kitchen (pp. 96-100 in the report[4]). Note that this is a question where multiple responses are permitted. * Tiles/brick.*

3.3. Ceiling and mouldings

Generally speaking, the proportion of people who want wooden mouldings in the rooms is relatively high (28-51% on average) (Fig. 7). Few consumers in Spain, however, prefer wooden mouldings (average 16% compared with an average of 46% for the rest of the countries). Wooden ceilings are particularly popular in Norway and Sweden (average 26%) and to a certain extent among German consumers (average 16%). Few people in the other countries want wooden ceilings (average 8%).

[4] *Trä i hemmet - En undersökning i sju europeiska länder om inredningsstilar och intresset för svenska interiöra furuprodukter till hemmet.* Available on Swedish Wood's website.

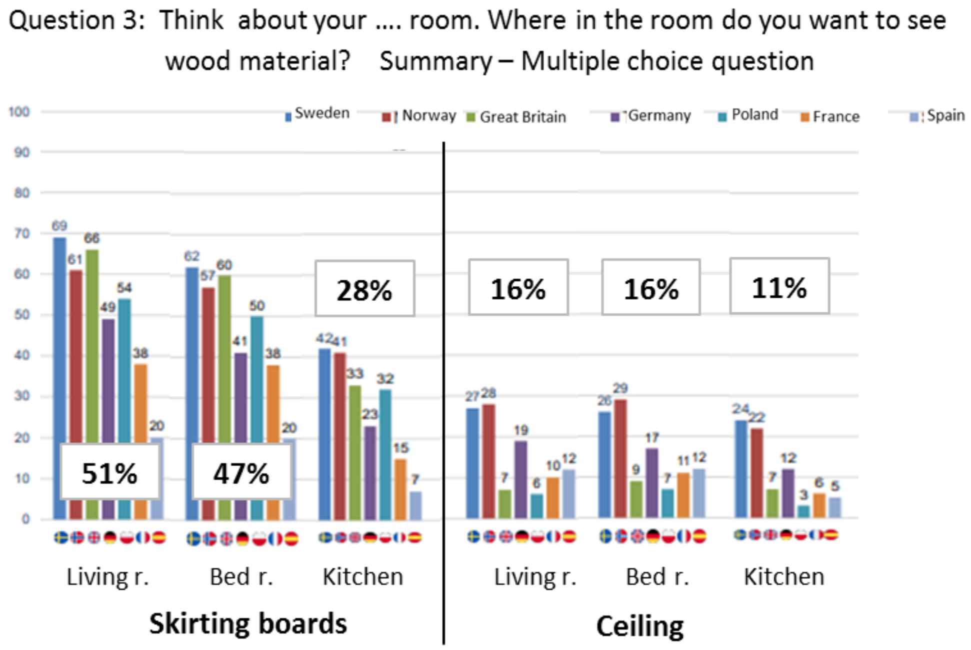

Fig. 7. Proportion of people who want wood for mouldings and ceilings in the living room, bedroom and kitchen (pp. 56-62 in the report[5]). Note that this is a question where multiple responses are permitted.

3.4. Furniture

Wooden furniture is most popular in the bedroom and living room (on average 58% and 63% respectively) (Fig. 8).

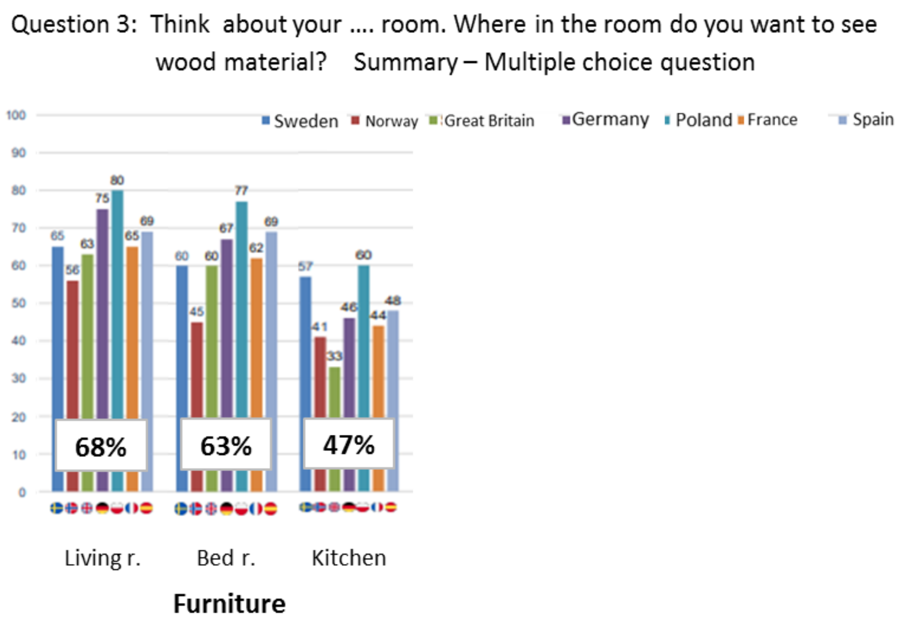

Fig. 8. Proportion of people who want wooden furniture in the living room, bedroom and kitchen (pp. 56-62 in the report[5]). Note that this is a question where multiple responses are permitted.

[5] *Trä i hemmet - En undersökning i sju europeiska länder om inredningsstilar och intresset för svenska interiöra furuprodukter till hemmet.* Available on Swedish Wood's website.

The most positive responses are from Poland (average 79%) and the least positive responses are from Norway (average 51%). Poland also comes top for wooden furniture in the kitchen, along with Sweden (both around 60% compared with an average of 42% for the others). It is also interesting that around double the number of British consumers want wooden furniture in the living room and bedroom than in the kitchen (average 62% versus 33%).

3.5. Floor

Wooden flooring is most popular in the living room, with the bedroom coming a close second (Figs. 9-10). In these two rooms, wooden floorboards or parquet flooring are the overwhelming preference among consumers in all the countries (average 64%), with the exception of the UK, where slightly more people prefer carpet to wooden flooring in the bedroom (41% versus 35%) (Fig. 9).

The British also stand out when it comes to living room flooring, where a much large proportion of respondents than in the other countries prefer carpeted floors (27% compared with an average of 7% for the rest). The French like tiled or stone floors almost as much as wooden flooring in the living room (36% versus 48%), but the other countries are much less keen on these inert materials (average 9%). It is also worth noting that Poland is the country where most people want wood floors in the living room and bedroom (over 80%).

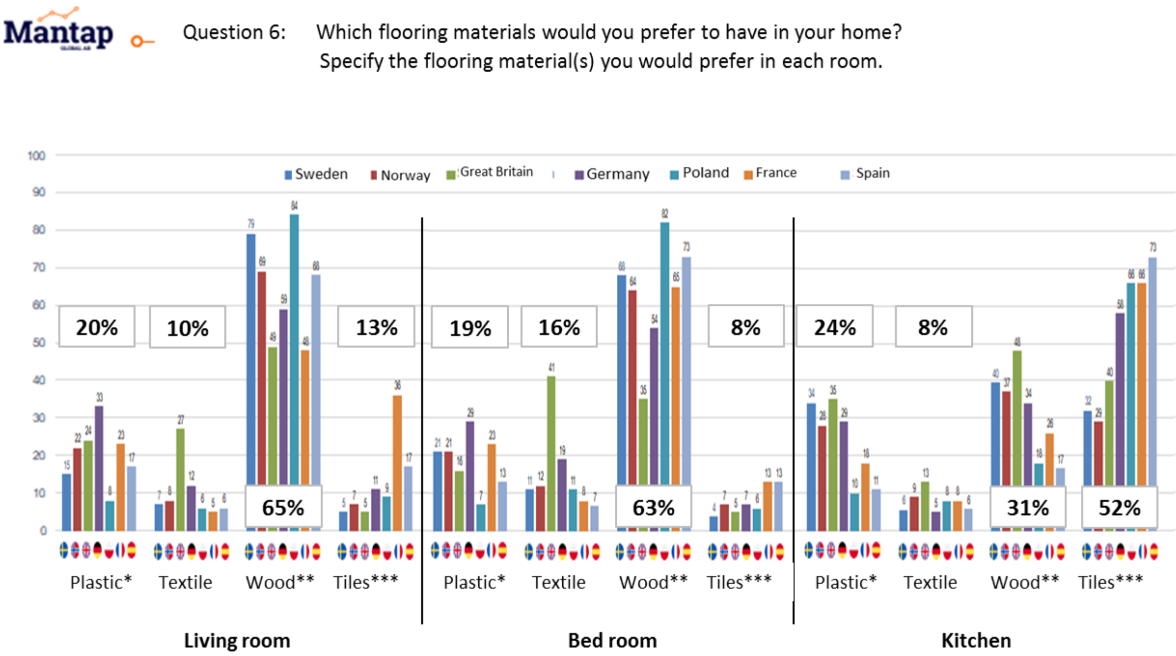

*Fig. 9. Preferred flooring materials in the living room, bedroom and kitchen (pp. 68-72 in the report[6]). Note that this is a question where multiple responses are permitted. *Vinyl/Laminate/Linoleum, **Wood, ***Tiles/stone.*

Wood floors in the kitchen are also popular among many Swedes, Norwegians and British people (35-49%) (Fig. 9-10). In these countries, wooden floorboards and parquet flooring are what most people prefer (average 42%), closely followed by tiled and stone floors (34%) and vinyl, laminate and linoleum (32%) (Fig. 9). In Germany, Poland, France and Spain, wood floors come in second place (average 24%) and instead the main preference is for tiled or stone floors in the kitchen (66%).

[6] *Trä i hemmet - En undersökning i sju europeiska länder om inredningsstilar och intresset för svenska interiöra furuprodukter till hemmet.* Available on Swedish Wood's website.

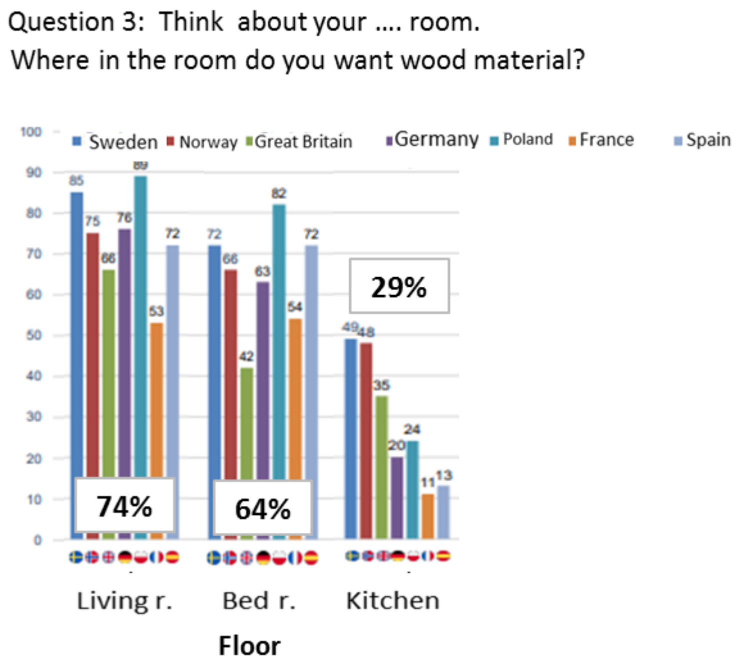

Fig. 10. Proportion of people who want wood on the floor (pp. 56-62 in the report[7]). Note that this is a question where multiple responses are permitted.

3.6. Kitchen unit doors and countertops

Wood is a popular option for kitchen unit doors in the majority of countries, with Sweden, the UK and Poland showing the greatest interest in wood (average 62%) and France the least (38%) (Fig. 11). Wooden counters are most popular in Poland and Germany (46%), and least popular in Spain (17%).

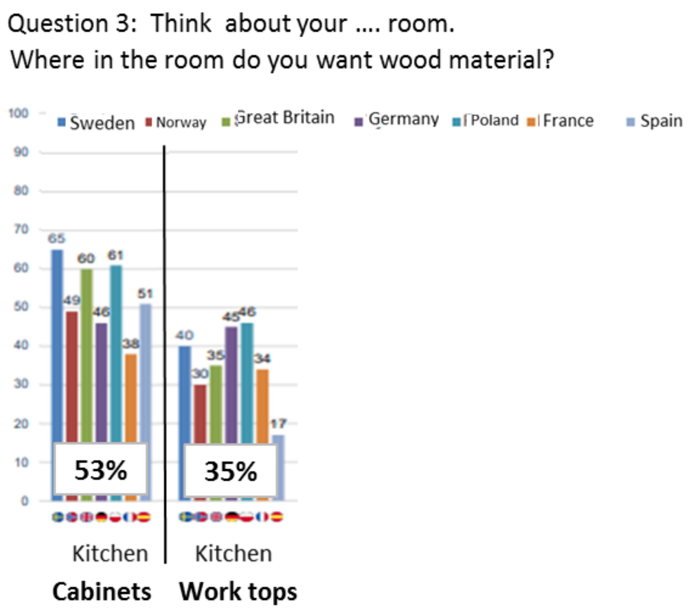

Fig 11. Proportion of people who want wood for kitchen unit doors and countertops (pp. 56-62 in the report[7]). Note that this is a question where multiple responses are permitted.

[7] *Trä i hemmet - En undersökning i sju europeiska länder om inredningsstilar och intresset för svenska interiöra furuprodukter till hemmet.* Available on Swedish Wood's website.

3.7. Conclusions: where in the home consumers want wood

The majority of consumers want wood in one or more places in their rooms at home. Major variations can be seen across the countries and, to a certain extent, also the rooms. Furniture and flooring are generally the applications where the greatest proportion of consumers want wood in the living room and bedroom. In the kitchen, the general preference is for wooden countertops, doors and furniture. Across all the rooms, consumers are least keen on having wood on the ceiling and on every wall.

4. Preferences for the look of wood products

In the study, the decision was taken to focus on preferences in two product groups, wooden flooring and wall cladding.

4.1. Colour palette

Whether or not a respondent was positive about wooden flooring/wall cladding, they were asked to imagine that they had one or other in their home and then choose their preferred colour palette(s) (light, white, dark, untreated, coloured) for the floor/cladding (Fig. 12).

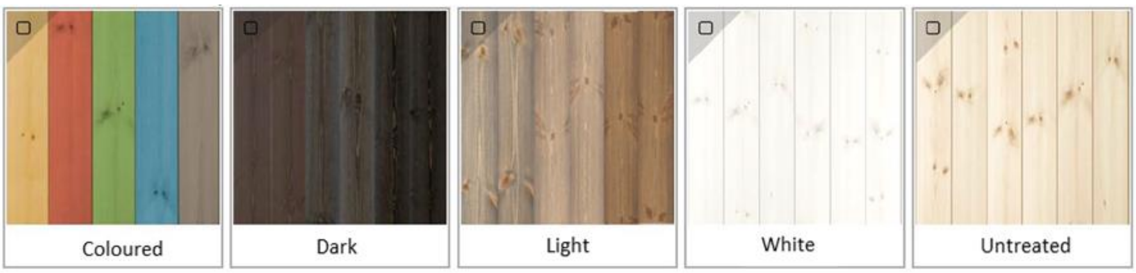

Fig. 12. Colour palettes that respondents were asked to choose from.

For floors, the clear favourite is the light colour palette (pale brown/grey), with the majority of consumers in all countries preferring this option (62-76%) (Fig. 13). Then there is a relatively even distribution between white (average 23%), dark (24%) and untreated (23%), with the coloured option coming in last (8%). There were no major differences from country to country, although white is slightly more popular in Sweden, Norway and France than in the other countries.

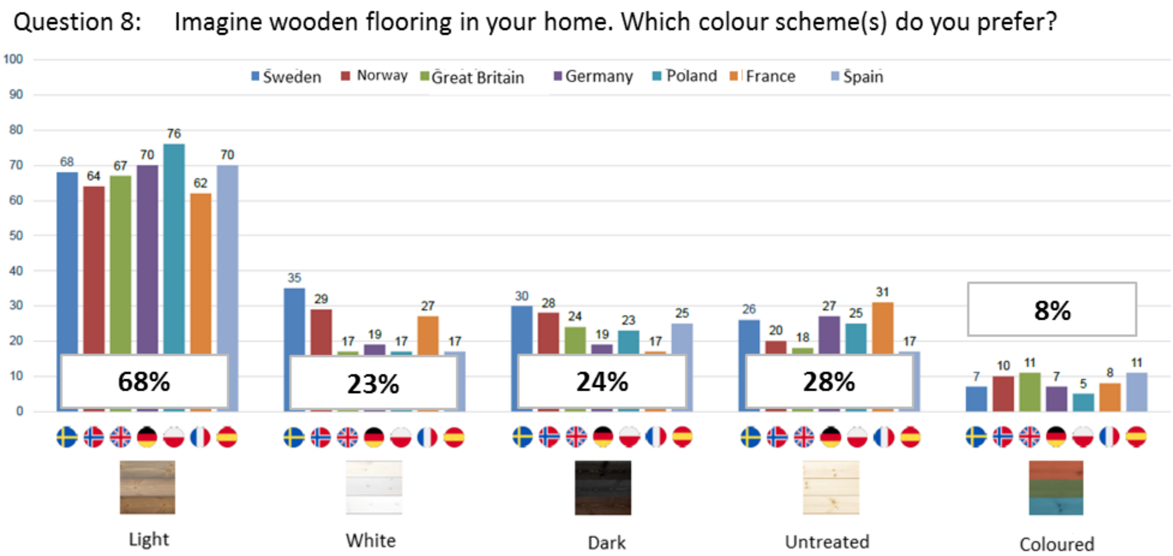

Fig. 13. Preferred colour palettes for wooden flooring (p. 84 in the report[8]). Note that this is a question where multiple responses are permitted.

For wall cladding, light (pale brown/grey), and white are the two palettes that were consistently chosen by the most people (average 45% and 42% respectively), followed by untreated wood (28%) and finally the dark and coloured palettes (16% and 15%) (Fig. 14). The results do not vary much between the different countries, but some differences can be teased out: white is slightly more

[8] *Trä i hemmet - En undersökning i sju europeiska länder om inredningsstilar och intresset för svenska interiöra furuprodukter till hemmet.* Available on Swedish Wood's website.

popular in Sweden and Norway, light in Poland and Spain and untreated in Germany, Poland and France.

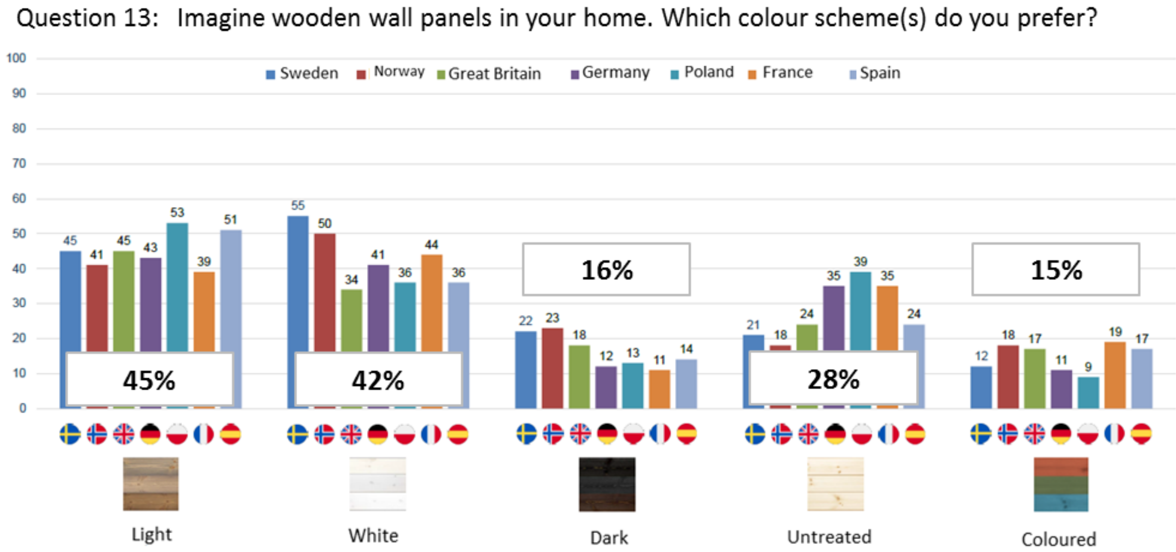

Fig. 14. Preferred colour palettes for wooden cladding (p. 113 in the report[9]). Note that this is a question where multiple responses are permitted.

4.2. Visible knots

Acceptance of and preferences concerning visible knots are also of interest for both wooden flooring and wall cladding, particularly when the focus is on pine. The respondents were therefore asked whether they liked visible knots or whether they preferred knot-free or painted surfaces.

In all the surveyed countries, more respondents like to see visible knots in wooden flooring (average 46%) than prefer knot-free floors (average 24%) or painted floors (average 7%) (Fig. 15). A sizeable proportion of the respondents (average 21%) have no preference either way when it comes to visible knots. The responses are relatively similar across the board, although Poland stands out as the country with the absolute highest acceptance of knots (a substantial 62% of the Polish respondents said that they like to see visible knots in wood floors; the corresponding figure for the other countries ranges between 39% and 46%).

[9] *Trä i hemmet - En undersökning i sju europeiska länder om inredningsstilar och intresset för svenska interiöra furuprodukter till hemmet.* Available on Swedish Wood’s website.

Question 10: What do you think about visible knots in wooden flooring?

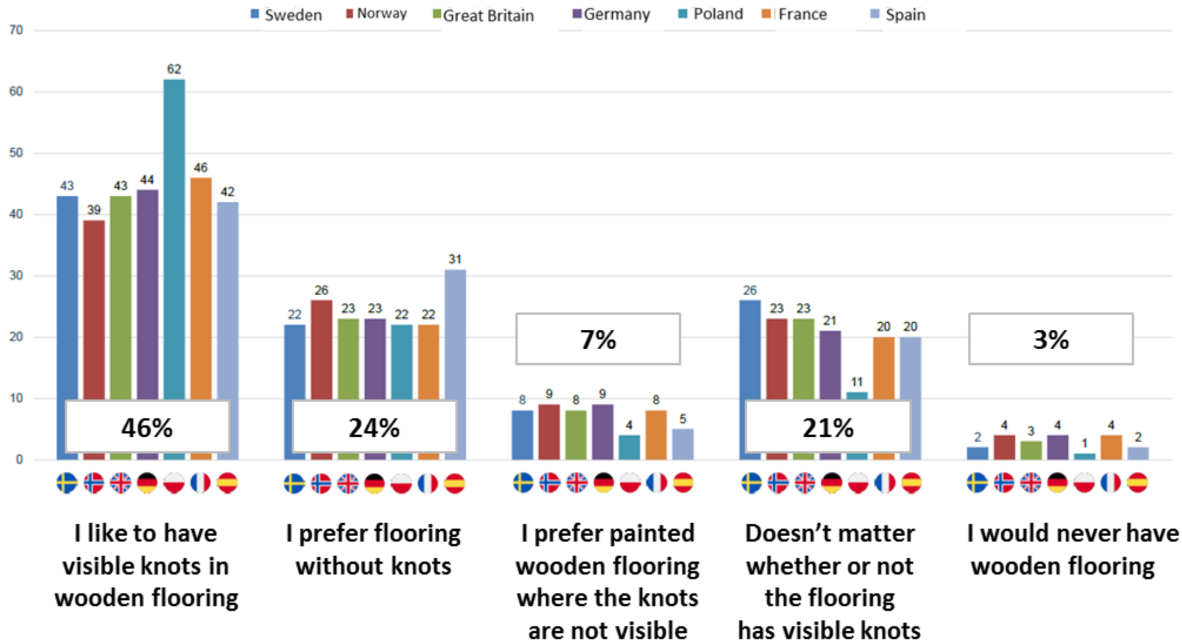

Fig.15. Preference for visible knots in wooden flooring (p. 92 in the report[10]).

The same is true for wall cladding, where visible knots are generally more appreciated (average 37%) than both the knot-free (average 25%) and painted (average 10%) options (Fig. 16). Once again, Poland stands out as the country where by far the most consumers prefer knotty cladding (50% of the respondents, compared with 32-40% in the other countries).

Question 14: What do you think about visible knots in wood panels?

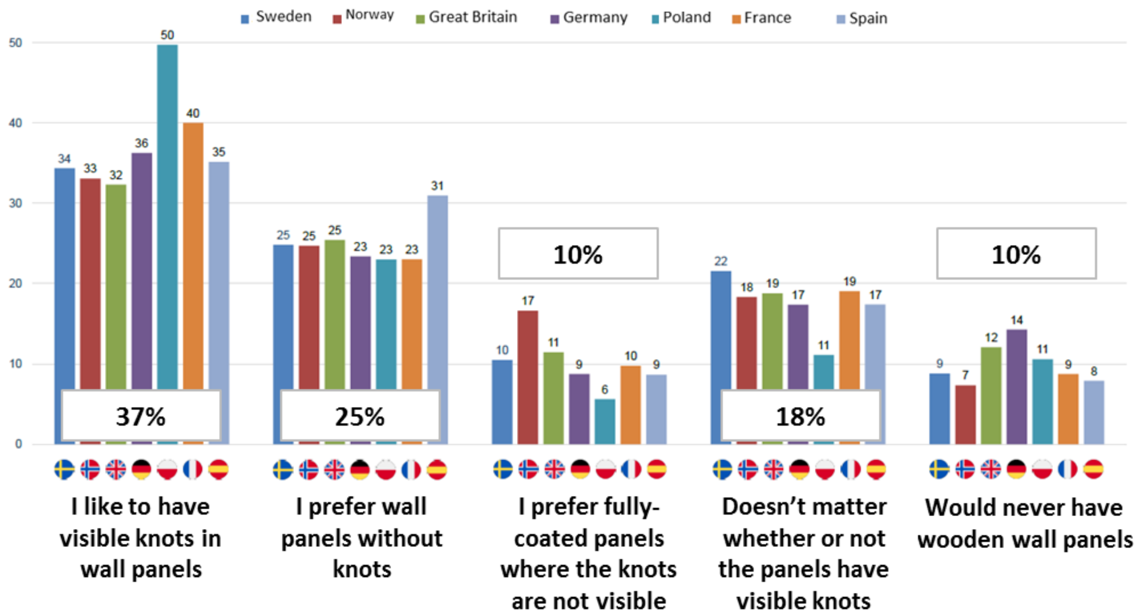

Fig. 16. Preference for visible knots in wooden cladding (p. 117 in the report[10]).

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[10] *Trä i hemmet - En undersökning i sju europeiska länder om inredningsstilar och intresset för svenska interiöra furuprodukter till hemmet.* Available on Swedish Wood's website.

The group that prefers knot-free surfaces is somewhat larger in Spain than in the other countries, both for floors and wall cladding (31% versus 22-26%). More Norwegian consumers (17%) like painted cladding compared with the other consumers (6-11%).

4.3. Pine

In order to form a picture of what role the species of wood plays in the choice of flooring, and more specifically the preference for pine, the respondents were asked to state whether they like pine, generally prefer other woods or feel that the wood species is not important. There was also the option to answer “Don’t know” or “Have no opinion”, which a small proportion chose to do (average 13%) (Fig. 17).

A relatively large proportion (average 34%) of consumers state that they like pine, and a similar figure (32%) state that they generally prefer woods other than pine. A slightly smaller group feel that the wood species is not important (average 21%). The results are quite similar for all the countries studied, but with some minor variations such as a slightly more than average liking for pine as a flooring material in Poland (41% compared with an average of 32% for the other countries).

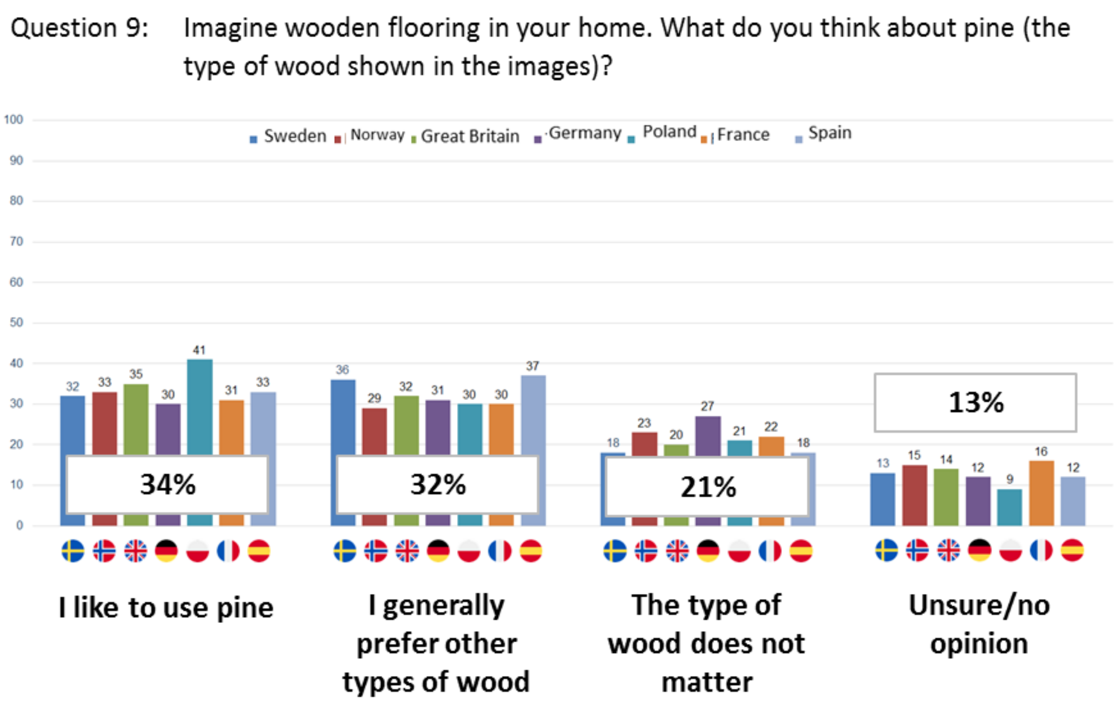

Fig. 17. Preferences for pine in wooden flooring (p. 88 in the report[11]).

4.4. Conclusions: preferences for the look of wood products

The colour preference for wooden flooring and wall cladding is relatively similar across the countries, with light wood floors (represented in the study as pale brown/pale grey) being popular with the most people. According to this study, other colour palettes have smaller markets. The preferences for cladding are a little more diverse, with light and white cladding coming out as the most popular, followed by untreated.

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[11] *Trä i hemmet - En undersökning i sju europeiska länder om inredningsstilar och intresset för svenska interiöra furuprodukter till hemmet.* Available on Swedish Wood’s website.

Another conclusion is that visible knots are acceptable to many consumers, both in flooring and cladding (an average of 67% and 55% respectively stated that they prefer visible knots or that it is not important to them), and that a relatively large group expressly prefer pine floors (average 34%). The proportions of people who prefer knot-free wood for their floors and cladding (average 25%) and those who generally prefer woods other than pine for flooring (average 32%) are, however, far from insignificant.

5. Purchase of home furnishing products

5.1. Influences on the choice of home furnishing products

A significant proportion of the respondents state that they personally have a major influence over the choice of home furnishing products (average 79%) followed by family, relatives and friends (an average of 41% state that this group has a major influence) (Fig. 18). Fewer consider that interior architects, builders and tradesmen and store staff have influence, with the responses being relatively similar for each of these categories. The country that stands out in this context is Spain, where the various occupational groups appear to have a similar level of influence as family, relatives and friends. Sweden and Germany are the countries where these occupational groups have the least influence.

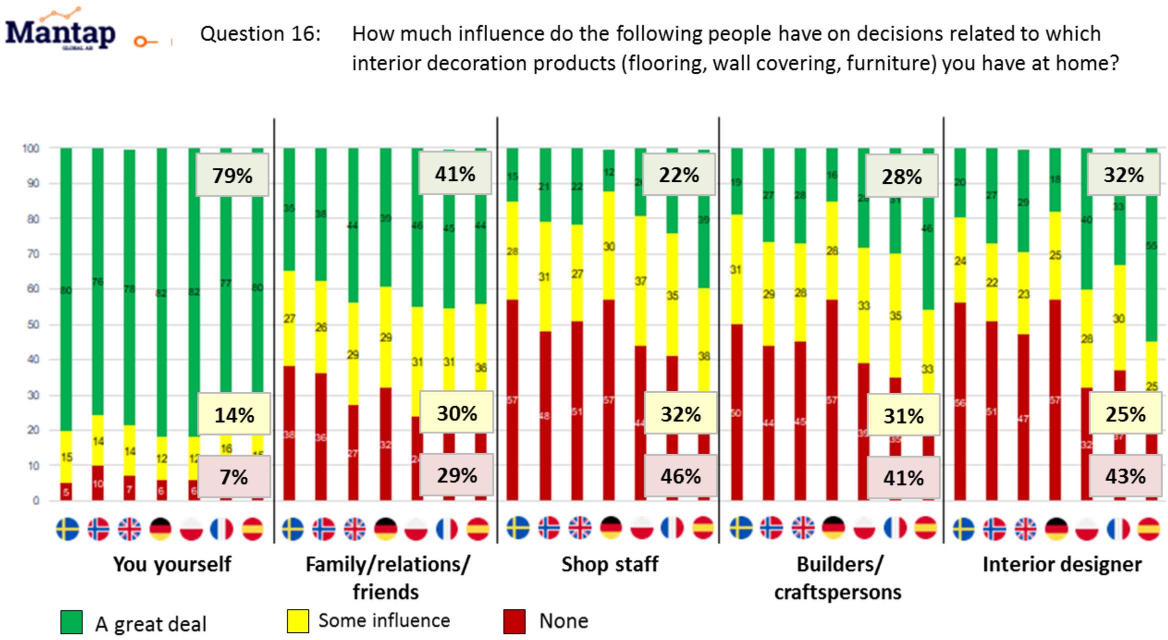


Fig. 18. Influence on decisions about which home furnishing products (flooring, wall coverings and furniture) the respondents have at home (p. 125 in the report[12]).

5.2. Key factors for purchase

The respondents were asked how important the factors *Ease of cleaning*, *Option of help with installation* and *Option of home delivery* are when considering the purchase of flooring and wall coverings. When purchasing either of these products, the first factor, *Ease of cleaning*, was important to the majority of the respondents (73-89%) in all the countries studied (Fig. 19). Fewer (46-71%) attached much importance to the other two factors, both of which were given more or less the same weight. Across the countries, however, certain differences are apparent: Sweden and Norway, for example, are the countries where the smallest proportion of respondents list help with installation and home delivery as key factors when purchasing flooring (49% and 46% respectively, compared with an average of 65% for the other countries).

[12] *Trä i hemmet - En undersökning i sju europeiska länder om inredningsstilar och intresset för svenska interiöra furuprodukter till hemmet.* Available on Swedish Wood's website.

The people in the study were also asked to imagine they were buying flooring and wall coverings for their home and then rank the factors of price, quality and look/design according to their influence on the purchase. The results show that price is considered most important by most people (average 39%), with quality mainly being ranked next (42%), and look/design mostly being considered least important (41%) (Fig. 20). Roughly speaking, however, the difference between these factors is not huge and their mutual ranking varies from country to country. What can be said is that within each country there are groups that think each factor is the most important and that these groups are relatively equal in size.

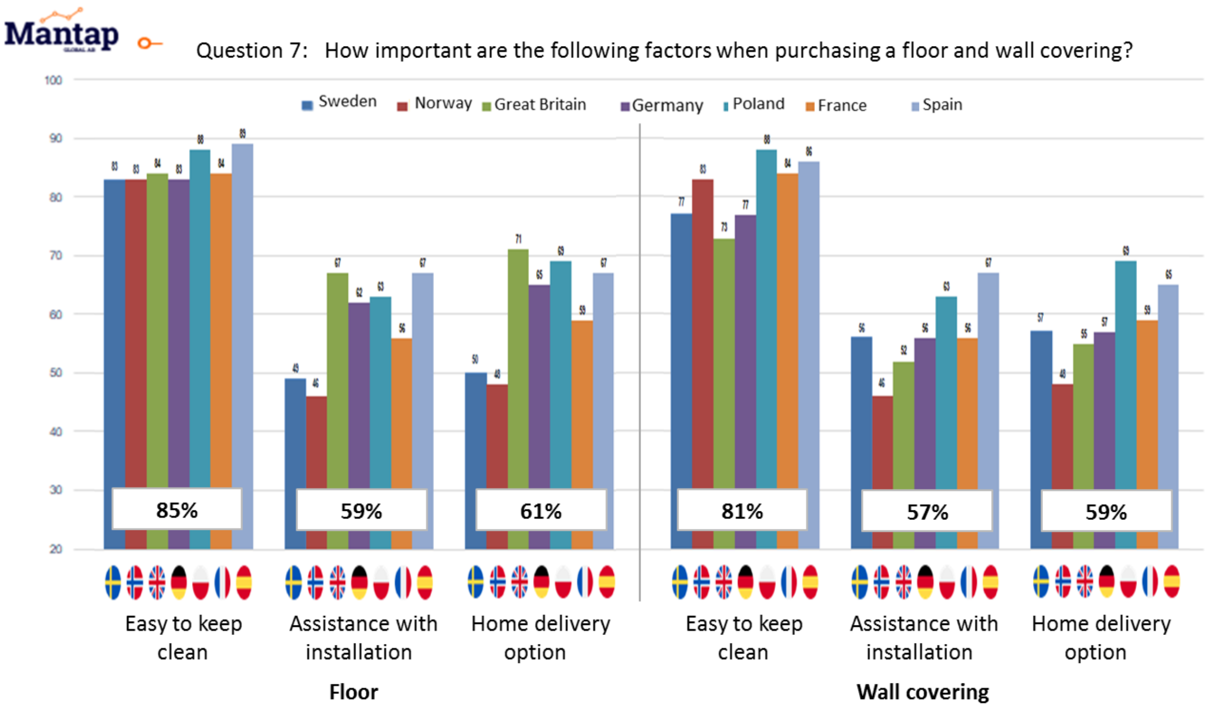
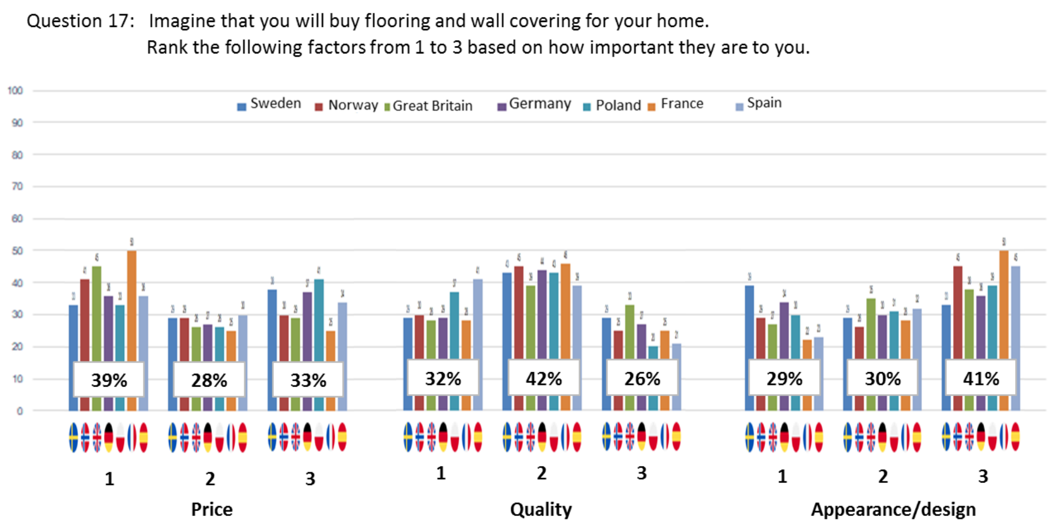


Fig. 19. Proportion of people who think each factor is important or very important when purchasing flooring and wall coverings. (Summary of pp. 108 and 132 in the report[13]).



[13] *Trä i hemmet - En undersökning i sju europeiska länder om inredningsstilar och intresset för svenska interiöra furuprodukter till hemmet.* Available on Swedish Wood's website.

Fig. 20. Ranking of the factors price, quality and look/design when purchasing flooring and wall coverings. 1=most important, 2=second most important and 3=least important. (Summary of pp. 129-131 in the report[12]).

5.3. Where consumers want to buy home furnishing products

The study shows that in principle a large proportion of consumers want to shop for home furnishing products in stores (average 44%), but also that many like to shop in-store and online (average 51%) (Fig. 21). The group that only wants to shop online is small (average 5%). Certain differences in national preference are, however, worth noting: Norway, Spain and Poland, for example, are the keenest on shopping only in-store, compared with the other countries.

Fig. 21. Where consumers most want to shop for home furnishing products (p. 136 in the report[14]).

5.4. Environmental impact of products

The respondents were asked their opinion on three statements regarding the environmental impact of products. The pattern of responses is quite similar across all the countries (Fig. 22): the majority (65%) of the respondents state that they value a product having a low environmental impact, but fewer (50%) state that they are willing to pay more for an ecofriendly product. Over half of the respondents (53-72%) state that wood is a better material than the alternatives from an environmental point of view.

[14] *Trä i hemmet - En undersökning i sju europeiska länder om inredningsstilar och intresset för svenska interiöra furuprodukter till hemmet.* Available on Swedish Wood's website.

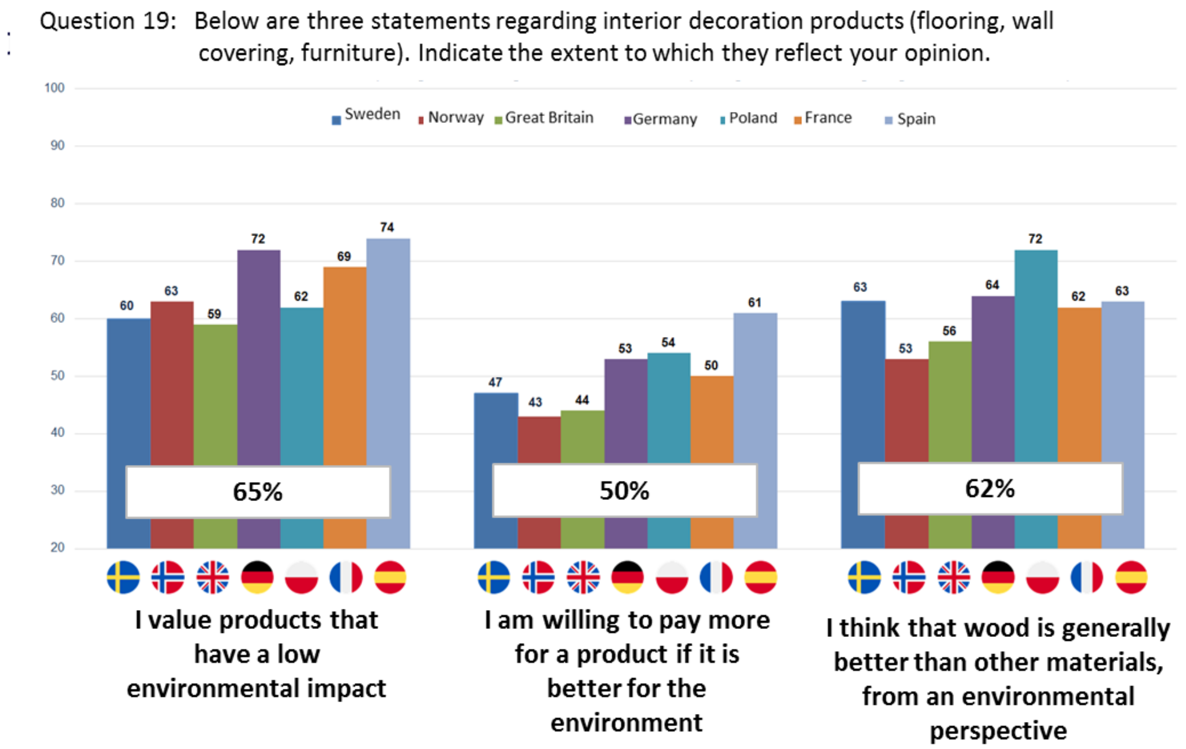


Fig. 22. Three statements about wood and the environment. The figure shows the proportion who agree (p. 144 in the report[15]).

The question of how much extra the interviewees were willing to pay for an ecofriendly product was examined separately (Fig. 23).

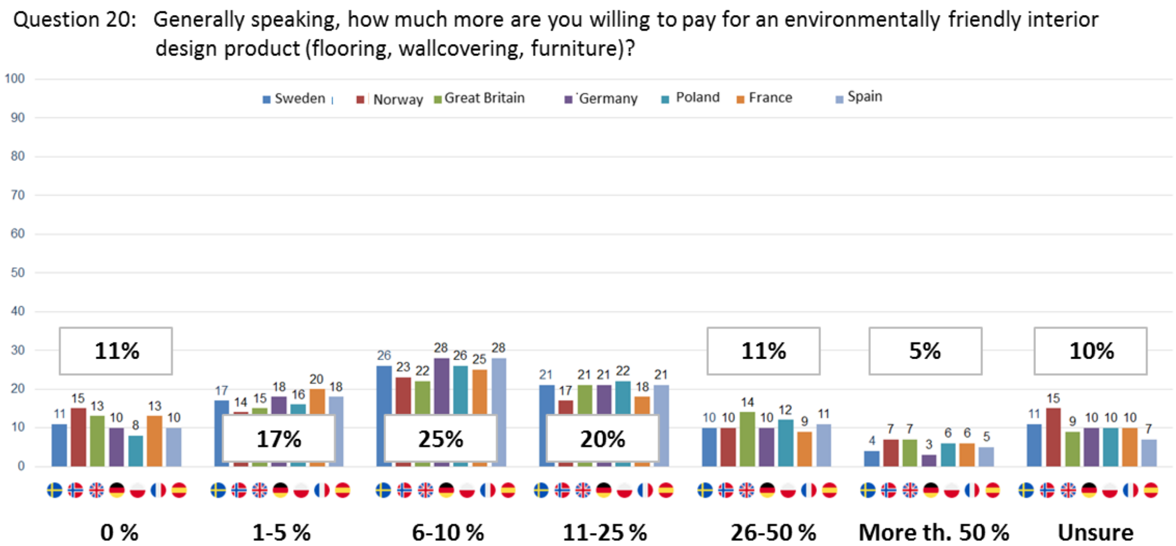


Fig. 23. How much extra people are willing to pay for an ecofriendly product (p. 148 in the report[15]).

Only a small group (11%) state that they are not prepared to spend anything extra and, compared with the previous question, many more state that they are willing to pay extra for a more ecofriendly product (78% versus 50%). This indicates that the results should be interpreted with caution and that

[15] *Trä i hemmet - En undersökning i sju europeiska länder om inredningsstilar och intresset för svenska interiöra furuprodukter till hemmet.* Available on Swedish Wood's website.

the respondents are likely to have been a little generous in estimating their willingness to pay. The variations between the countries are small.

5.5. Conclusions: purchase of home furnishing products

Family, relatives and friends generally have more influence over the purchase of home furnishing products than store staff, tradesmen and interior architects. Over half of the respondents state, however, that these occupational groups do have considerable or some influence over purchases.

It is also clear that ease of cleaning is important to most consumers. Help with installation and home delivery are generally other important factors, but there are major variations from country to country. Many people appreciate a product having a low environmental impact, but fewer are willing to pay extra for this attribute. The customer groups that find price, quality and look/design most important are relatively similar in size.

The results show that consumers generally prefer to shop for home furnishing products in-store rather than online, although many want to shop online to some extent.

6. Summary of the results

The purpose of the study was to examine customer preferences for visible wood in different markets. The study focused on the following four questions:

- What interior design styles dominate and how does interior wood fit in with these styles?
- Where in the home do consumers want wood?
- What are the preferences regarding the look of wood products?
- What is important when purchasing home furnishing products?

The results from these questions have been presented in separate sections above, but the headlines can be briefly summarised as follows:

- Modern style is the type of interior design that most people prefer
- Wood reinforces a positive attitude towards interior design styles, i.e. people become more positive towards a style if it has exposed wood than if there is no wood
- A moderate amount of interior wood (represented in the study as wood for the floor and furniture) is considered appropriate, irrespective of the style
- The majority of consumers want wood in one or more places in their rooms at home
- Consumers generally want more wood in the living room and bedroom than in the kitchen
- The colour preference for wooden flooring and wall cladding is light rather than dark or bold colours
- Visible knots are acceptable to many consumers, both in flooring and cladding
- A relatively large group specifically prefers pine flooring
- Family, relatives and friends generally have more influence over the purchase of home furnishing products than store staff, tradesmen and interior architects
- The customer groups that find price, quality and look/design most important are relatively similar in size
- For many consumers, ease of cleaning, help with installation and the option of home delivery are all key factors for their purchases
- Consumers generally prefer to buy home furnishing products in-store rather than online, although many want to shop online to some extent
- The customer preferences regarding interior design styles are relatively similar from country to country. Clear differences can, however, be seen when it comes to where consumers want wood, and there are also some differences with regard to the appearance of wood products and the purchase of home furnishing products.

7. Closing remarks

Swedish Wood has recently highlighted the positive signals concerning the demand for pine, including the fact that pine products are increasingly taking pride of place at trade fairs and in the work of leading designers. The results of this study show that these positive trends have also reached the end consumers; they want wood in their homes and the properties of Swedish pine, such as its light colour, knot pattern, environmental credentials and great value, are a good match for what customers feel makes a positive difference to the home. This suggests that the previous negative trend of declining demand for pine has been broken.

The results in the report have a lot to offer both interior designers and those who work with joinery timber and wooden cladding, as the report provides a broad, and to a certain extent also detailed, picture of customer preferences for exposed wood in homes all across Europe. The Swedish joinery industry in general, and particularly those companies that export, can incorporate the report's results into their material and product development and into the development of their marketing strategy. There are also more in-depth reports, in Swedish, for each of the countries featured in the study for those who would like a more detailed presentation of customer preferences. These are available on Swedish Wood's website.

The study has proven a great success, paving the way for similar studies in other regions/countries of interest to the industry. It could also form the starting point for more detailed studies into issues of special interest, relating for example to a particular product group and/or attribute.

Finally, we would like to extend our thanks to BioInnovation, which funded the study, and to everyone who completed the questionnaire or contributed in some other way.